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Mexico

Product Brief

Pet Food Market Brief

2003

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Report Highlights:

The growth in the Mexican pet food market continues unabated (despite misleading U.S. Customs export figures for 2002). The U.S. has a preponderant market share among imported pet foods. However, domestic production of pet food is increasing in response to growing demand. Surprisingly, the most important outlet for pet food sales is through mom & pop, corner grocery stores.

Includes PSD Changes: No
Includes Trade Matrix: No
Unscheduled Report
Mexico [MX2]
[MX]

I. Market Overview

The Mexican import market for pet food is one of the fastest growing market segments in one of the fastest growing import markets in the world. Sales increased annually on average 40 percent from 1996 to 2001.¹ The United States has more than a 95 percent share of the import market for pet food in Mexico. Domestic production is increasing, but not at a rate to meet the increase in domestic demand. The increasing per capita income in Mexico has led to an increase in the number of pets per household, particularly in urban areas. In addition, aggressive marketing campaigns and increased regulations requiring visits to veterinarians, have led to more Mexicans to feed commercial pet food to their animals in place of table scraps. Dog food sales are approximately 85 percent in value of all pet food sales in Mexico. Sales of cat foods comprise most of the remaining 15 percent, though there is a small amount of sales of rabbit, rodent, bird and fish food.

Table 1: Advantages and Challenges for U.S. Exporters of Pet Food to Mexico

Advantages	Challenges
<ul style="list-style-type: none"> Proximity to the United States, particularly important for bulky consumer food items 	<ul style="list-style-type: none"> Growth in domestic production and price advantage over imported products
<ul style="list-style-type: none"> High recognition of U.S. brands of pet food and awareness and association of U.S. with high quality 	<ul style="list-style-type: none"> Difficult and frequently revised sanitary regulations for pet foods in Mexico
<ul style="list-style-type: none"> Continuing market growth because of the increase in number of pets and increase in commercial pet food fed to domestic pets 	

II. Market Sector Opportunities and Challenges

a. Domestic Production

Mexican production of pet foods in dollar terms increased from an estimated \$72.9 million in 1999 to approximately \$107.0 million in 2001. The traditional balanced feed industry for livestock are the major producers of pet food in Mexico and have branched out into pet food production recognizing its market potential. Dog food represents 89 percent of the total per food production in Mexico.

¹ The statistics on sales of imported pet foods to Mexico are dramatically different when comparing U.S. and Mexican trade and commercial figures. For example, in 2001, U.S. customs figures indicate sales of over \$200 million of U.S. pet foods to Mexico, while Mexican figures indicate that total sales of imported pet food from all sources was about \$115 million in total. In addition, U.S. customs figures show a decline in sales in 2002, though industry sources state there was only a modest decline if any, and others thought the market held steady in 2002. Regardless of these statistical differences, it is clear that the market for imported pet food is growing and presents an excellent opportunity for U.S. exporters.

Table 2: Mexican Production of Pet Foods, 1999-2001
(U.S. Million Dollars and Thousand Tons)

	1999		2000		2001	
	\$	Tons	\$	Tons	\$	Tons
Production	72.9	389	93.1	380	107.0	437

Source: Seccion de Fabricantes de Alimentos Balanceados para Animales-CANACINTRA and trade contacts. All dollar values used in reporting Mexican data were calculated according to the average exchange rate of the peso against the dollar for each year: 9.7, 9.2 and 9.3 pesos per one U.S. dollar for 1999, 2000 and 2001, respectively.

There are 360 registered producers of animal feed in Mexico, of which 20 specialize in pet foods. Pet food production has increased rapidly in recent years, but still represents a small percent of total balanced feed production. In 1999, it represented 4.3 percent and increased to approximately 5 percent of total balanced feed in 2001. Ten of the larger producers are registered in the Grupo Amascota, a trade association for pet food and pet product producers and sellers. The three leading pet food producers in the market are Effem de Mexico (Pedigree) with an estimated 50 percent market share; Purina/Nestle (Dog Chow) with approximately 30 percent; and three other brands, Malta Clayton, Aceitera La Junta and Los Belenes, with approximately ten percent of the market.

b. Imports and Foreign Competition

Mexican imports of pet foods increased from \$66.9 million in 1999 to \$114.0 million in 2001. Also, Mexican imports grew in terms of tonnage from 112.8 thousand tons in 1999 to 186.7 thousand tons in 2001.

Table 3: Mexican Imports of Pet Foods, 1999-2001
(U.S. Million Dollars; Thousand Tons)

Import Code Numbers	1999		2000		2001	
	\$	Tons	\$	Tons	\$	Tons
2309.1001-Pet foods for dogs and cats prepared for retail sales	66.9	112.8	86.5	142.6	114.0	186.7
2309.9004-Mixtures, preparations or organic for ornamental fish	0.9	0.1	1.6	0.2	1.4	0.2
Total	67.8	112.9	88.1	142.8	115.0	186.9

Source: Banco Nacional de Comercio Exterior-BANCOMEXT (National Bank of Foreign Trade)

U.S. exports to Mexico, based on Mexican statistical figures, increased from \$66.3 million in 1999 to \$141.9 million in 2000 and to \$111.2 million in 2001. Exports of pet foods for dogs and cats for retail sale represent almost all of U.S. pet food export sales to Mexico.

Table 4: U.S. Pet Food Exports to Mexico, 1999-2001

(U.S. Million Dollars and Thousand Tons)

Import Code Numbers	1999		2000		2001	
	\$	Tons	\$	Tons	\$	Tons
2309.1001-Pet foods for dogs and cats prepared for retail sales	65.9	112.2	84.9	141.8	110.4	183.3
2309.9004--Mixtures, preparations or organic for ornamental fish	0.4	0.096	0.9	0.147	0.8	0.1
Total	66.3	112.3	85.8	141.9	111.2	183.4

Source: Banco Nacional de Comercio Exterior-BANCOMEXT (National Bank of Foreign Trade)

Official Mexican import statistics listed 11 other countries as exporting pet foods to Mexico during the 1999-2001 period. Export sales, by principal countries, and their respective market shares are listed below.

Table 5: Mexican Pet Food Imports by Country, 1999-2001

(U.S. Million Dollars and Percentage)

COUNTRIES	1999	2000	2001
United States	66.3	85.8	111.2
Percentage Market Share	97.8	97.4	96.7
Canada	1.0	1.2	2.6
Percentage Market Share	1.4	1.4	2.3
Germany	0.4	0.7	0.5
Percentage Market Share	0.6	0.8	0.4
Other	0.1	0.4	0.7
Percentage Market Share	0.2	0.4	0.6
Total Market Value	67.8	88.1	115.0
Total Market Share	100.0	100.0	100.0

Source: Banco Nacional de Comercio Exterior-BANCOMEXT (National Bank of Foreign Trade)

c. Domestic Consumption

The Mexican Canine Federation estimates there are approximately 20 million dogs in Mexico, of which 12 million, or 60 percent, receive specialized veterinarian service and commercial diets. Both the middle and upper classes own dogs and feed them commercial diets. On the other hand, there are approximately 13.5 million cats of which only 5 percent receive veterinarian care and are fed commercial diets. Cats are more popular among the wealthiest segment of the Mexican upper class and are also commonly kept by the poor rural population to control the rodent population.

d. Market Structure

Trade sources and a consumer survey (conducted in 2000) indicate that 60-70 percent of pet food sales are through the retail market. Discussions in April 2003, with the Mexican pet association, AMASCOTA, and revealed that that figure has climbed to 92 percent, with most pet food being sold through central markets (central de abastos) to mom & pop stores. These mom & pop stores then sell by the kilo from large bags of dry pet food (mostly dog food).

Table 6: Sales Channels for Pet Foods in Mexico, 2000
(Percentages of total sales)

Sales Channel	Sales Percentage
Wholesale (Wholesale markets that sell to traditional retail including public markets, street markets, mom & pop stores)	55
Large supermarket chains	37
Total	100

Source: AMASCOTA & the Pet Food Institute

Over 50 percent of commercial sales of pet food take place in the Mexico City Metropolitan Area and in northern Mexico, particularly border states. The city of Monterrey in Nuevo Leon has the largest concentration of sales in Northern Mexico.

Table 7: Retail Sales of Pet Food in Mexico by Region, 2000
(Regions and percentages)

Regions	Sales
Mexico City Valley	31
North	22
Pacific	15
Central	11
Southeast	11
Central west	10
TOTAL	100

Source: AC Nielsen, Retail Index

In a random retail and specialized-store check conducted in the Mexico City Metropolitan Area, the following pet food brands from the United States were identified:

Dog Food:

- Friskies Pet Care Co. (Alpo, Mighty Dog),
- Heinz Pet Products (Award),
- Ralston Purina (Purina Care, Puri Carne, Kibbles and Chunks), Eukanuba (Procter & Gamble),
- Simmons Food Inc. (Happy Dog),
- Waltham (Pedigree),
- Price Club (Canine Club);
- Kal Kan Foods Inc. (Pal),
- Farmland Industries Inc. (Eat ém -Up, Right)
- Pet Products Plus, Inc. (Royal Canin), Pro Vision (Pro Plan);

Cat Food:

- Litter-Purrfect (Litter-Purrfect),
- Heinz Pet Products (9-Lives),
- Ralston Purina (Cat Chow),
- Friskies Pet Care Co. (Friskies, Chef's Blend, Ocean Fish Flavor, Gourmet Flavor),
- Sheba Inc. (Sheba),
- Hill's Pet Nutrition Inc. (Hill's Science Diet);

Fish Food:

- The Wardley Corp. (Guppy flakes, Floating/sinking pellets),
- Aquarama (Flakes for tropical fish).

III. Entry Strategy

a. Business culture

Personal relationships are the primary base of Mexican business relationships. Mexicans attach great importance to courtesy in all business endeavors. Many will not want to do business, regardless of the viability of the project, with someone who does not practice general courtesy or is considered rude or disrespectful. A warm handshake combined with conversation about the person's well being, family, or other similar topics prior to launching into any conversation related to business is considered a common courtesy. The concept that "time is money" should be left at the border, and though Mexican businesses are also conscious of the bottom line, courtesy and diplomacy are more important values to most Mexicans than getting immediately "down to business". In the face of a disagreement, Mexicans tend to be skilled at diplomacy and choose to avoid confrontation and loss of face. In a potential confrontation they strive to reach a consensus without having clearly defined winners and losers. These skills of diplomacy are important when approaching all forms of business in Mexico.²

The best way to understand the Mexican market is to visit the marketplace and to talk to buyers, retailers, distributors and other players in order to prepare a more effective entry strategy. U.S. exporters must do their research not only in terms of typical market research, but also finding appropriate business contacts and thoroughly reviewing Mexican import regulations in order to successfully seize market opportunities and overcome market challenges. An affordable way to investigate the market is to participate in and/or attend Mexican trade shows, particularly U.S. Pavilions organized by the Agricultural Trade Office (ATO) at selected shows. A show can serve as a way to contact local distributors/sales agents, buyers and businessmen, and to become familiarized with local competition. In the case of new-to-market companies, be prepared to provide support for in-store and media promotions to familiarize consumers with your products.

U.S. exporters should seriously consider contacting local distributors/importers as an important early step in their efforts to establish themselves in the Mexican market. A good distributor should promote sales and make sure that the imported products are available at points of sale. It is essential to maintain close contact with your representative, especially regarding changes in import procedures and documentation.

In summary, though Mexico is a burgeoning, modern country with an increasingly sophisticated infrastructure that borders the United States, an exporter should realize the business culture is very different from what is found domestically. Several important points should be recognized in order to have success in the market:

- *Business is generally conducted in Spanish, not English.* Though many educated Mexicans speak English, many professional business people do not speak English and they may be a key contact. Assume business and communication will be conducted

² The reference for this section is a book by Eva Kras, Management in Two Cultures, Intercultural Press, Inc, 1995, which provides an excellent comparison of the business cultures in the U.S. and Mexico.

in Spanish and have a translator, or better yet, a person working for you that does speak Spanish.

- *Personal face-to-face communication is critical.* Personal contact with buyers is necessary to initiate business contacts in Mexico, a fax or an email to start a business relationship is not considered reliable or appropriate and will often be completely ignored. A business serious about sales will need to visit the market to explore the opportunities in person for their product and develop personal contacts. Follow-up by email or fax is appropriate, but someone in country that can be contacted, or periodic personal visits are also important.
- *Distributors/importers are a key component to export sales in Mexico.* Finding a good importer/distributor in Mexico is a critical part of success in exporting to Mexico. Avoiding these key links in the distribution process to save money will almost always result in a loss of resources. They both provide a link to buyers, an in-country contact, and have the expertise to handle complicated regulations and can trouble shoot problems that imports can face at the border.

b. Trade Services Available and Events

U.S. firms should consider using a variety of marketing tools to effectively distribute their products in Mexico. These promotional activities could include:

- Participating in trade shows,
- Preparing brochures and promotional materials in Spanish,
- Obtaining a local sales representative, and
- Hosting technical seminars to inform end users, distributors and retailers of new technologies, innovations and product advantages.

The Agricultural Trade Offices in Mexico, Mexico City and Monterrey, provide services to help you access the market. In addition to sponsoring U.S. Pavilions, see below, the office can provide information about local distributors and contacts, and can arrange services from a contractor who can set up individual meetings for you in country for a fee. These contractors, referred to as Ag Aides, can provide a link from you to both distributors and retailers of pet foods in Mexico. For more information on available services, or to connect with our Ag Aides, please contact our office in Mexico City or Monterrey. (See contact information in Section V.)

Trade Events

ANTAD 2004

When: March 12-14, 2004

Where: Expo Guadalajara Convention Center, Guadalajara, Mexico

Contact: Carlos Zertuche, U.S. Agricultural Trade Office (ATO)-Mexico City

Tel: (011-5255) 5280-5291; **Fax:** (011-5255) 5281-6093;

Email: carlos.zertuche@usda.gov

Show Type: Mexico's largest retail and supermarket show.

Mexico's primary trade event organized specifically for dogs, is "**ExpoCan,**" held annually and usually scheduled in mid-September of each year by the Federación Canófila Mexicana (Mexican Canine Federation). The most important exposition for cats is the "**ExpoGato International**" usually held in October. For more information on these events, contact the Mexican Canine Federation (contact information in Section V.)

Specialized Trade Publications

There are several trade magazines related to pet foods that circulate in Mexico. The leading publications are:

- **"Perros, pura sangre,"** published monthly by the Federacion Canofila Mexicana, Contact: Gianfranco Pontecorvo, Advertising Director, Tel: (011)(5255)5358-9522; Fax: (011)(5255) 5358-9191 and <http://www.perros-purasangre.com.mx>;
- **"Mascotas Felices,"** published monthly by Editora Cinco, Contact: Ms. Guadalupe Pardo Aguirre, Tel: (011)(5255)5687-1586;
- **"Hablando de Mascotas,"** published by Impresores Alvarez, Contact: Ms. Dolores Carrera Lopez, Tel: (011)(5255)5370-2206 and 5379-9804.

IV. Import Requirements**a. Tariffs and Taxes**

All import tariffs for "Dog/cat food, available for retail sale" (2309.1001) and "Mixtures, preparations or organic for ornamental fish" (2309. 9004) reached zero on January 1, 2003.

Mexico has a fifteen percent value-added tax (VAT, or IVA in Spanish). Mexican Customs collects the VAT on foreign transactions upon entry of the merchandise into the country. For example:

	Product Price
F.O.B. Invoice value	\$100.00
Value added tax (15 percent)	<u>15.00</u>
Total	\$115.00

Customs brokers use total figure to calculate their fees, which usually are 0.5 percent, on average, plus any storage and handling fees.

b. Import and Health Certificates and Non- Tariff Requirements

The basic Mexican import document is the Pedimento de Importacion (customs entry document), which must be presented to Mexican Customs together with the commercial invoice in Spanish and a bill of lading. Products qualifying as "North American" must be accompanied by the NAFTA certificate of origin to receive preferential treatment. This is issued by the exporter and does not have to be validated or formalized. Mexican Customs Law is very strict regarding proper submission and preparation of customs documentation. Errors in paperwork can result in fines and even confiscation of merchandise as contraband. Exporters are advised to employ competent, reputable Mexican importers or custom brokers.

Under NAFTA, Mexican imports of pet foods do not require import permits. However, pet foods exports to Mexico are subject to a Sanitary Certification and inspection by the Sanitary Qualification Office of the Health Ministry as published in the Diario Oficial (Official Gazette) on August 29, 1994. This Certificate is secured after presenting a Sanitary Statement (Constancia Sanitaria) from the exporting country's respective sanitary authorities or a FDA-certified laboratory declaring that the products, identified by production lot, are safe and fit consumption; indicating their physical-chemical analysis; microbiological analysis; and if applicable, specific analysis; country of origin and expiration date. If this Sanitary Statement is not available, then it is necessary to present the above mentioned documents individually plus the following: certificate of origin and a certified letter stating that those items are sold freely in the country of origin. In addition, U.S. companies must have a Mexican importer or

a representative registered with the Secretary of Finance and Public Credit (SHCP) in order to export to Mexico.

In 1999 the Mexican Government, through the Secretaria de Agricultura, Ganaderia y Desarrollo Rural-SAGAR (Secretariat of Agriculture, Livestock and Rural Development) published a rule (PROY-NOM-060-ZOO-1999) which prohibits the use of imported rendered products in animal feed from countries with BSE or scrapies, or unless treated at high temperature and pressure. This rule does not currently apply to products from the United States.

c. Labeling

Imported products to be sold at retail must be labeled according to Mexican government specifications. Some U.S. suppliers choose to develop special packaging for the Mexican market. At a minimum, a label must be affixed to each package of the imported product prior to entering the country. All the information on the label must be in Spanish and must include the following data:

- Commercial/brand name
- Producer's name and address
- Exporter's name and address
- Country of origin (i.e., Producto de EE.UU.)
- Importer's name, address and RFC number (taxation number)
- Product description in Spanish
- Product description in English
- Preparation and handling instructions
- Net weight in metric units
- Date of expiration
- Ingredients
- Special warnings*

*Starting in 2002, a label is required on the bag or can of pet food in Spanish stating that the food is prohibited for use as feed for ruminants.

d. Cargo Unloading, Transport and Storage Fees

Cargo unloading fees vary depending on the weight, number of pieces, type of merchandise and location. These fees are usually charged according to pre-established tables. However, whenever possible, shippers should compare prices between service providers. In general, cargo-unloading fees in Mexico are slightly higher than those in the United States for comparable services.

Trucks are the most reliable method of delivery within Mexico, accounting for approximately 60 percent of cargo volume. Trucking companies cannot bring merchandise directly from the United States to Mexico. A U.S. trucking company drives the shipment to the border and transfers its trailer to a Mexican rig. The best way to ship by truck is to use an internationally bonded carrier that has relationships with Mexican carriers. Mexican trucking companies generally determine their fees by mileage or distance, weight and type of merchandise. Practically all transport companies freight forwarders offer a basic insurance plan which cover transport and handling of cargo. When selecting a transporter it is recommended to check their claim history and complaints they might have received. While shippers will find that truck transportation is more expensive than "Container in Flat Car" (COFC) or "Trailer Flat Car" (TOFC), in general, transport fees are lower in Mexico by as much as 10 percent.

Warehousing costs vary depending on the space required and any specific product needs. Warehousing fees follow general market trends of supply and demand; however, it is advisable to compare prices, facilities and reputation, and negotiate before contracting. Average warehouse rental fees in Mexico City are around \$3.60 m2, per month; \$3.00 in the Guadalajara area and approximately \$3.20 per m2 in Monterrey and surrounding areas. In-bond storage facilities are a popular storage method used by exporters by which duties are paid on the items stored until they are released from the facility for distribution in the market. Any merchandise placed in a warehouse should be insured. A basic insurance policy can be secured from the warehouse administrator or a more comprehensive policy from a private insurance company.

V. Contacts

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<http://www.perros-purasangre.com.mx/fcm/fcm.html>

Contact: Dr. José Luis Payró, President

Importers:

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